



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

DOD: 4-17-13		KATINA SAPIEN LOZANO PAULEY , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 021014, 030414		Account period: 9-19-11 through 12-16-13	<u>Continued from 2-10-14, 3-4-14</u>
	Aff.Sub.Wit.	Accounting: \$ 102,960.95	
✓	Verified	Beginning POH: \$ 37,268.63	
	Inventory	Ending POH: \$ 17,668.83	
	PTC	(\$15,668.83 cash plus \$2,000.00 personal property (household) items)	
	Not.Cred.	Conservator: Waives	
✓	Notice of Hrg	Attorney: \$7,295.00 (per declaration)	
✓	Aff.Mail	(Note: \$8,874.83 has already been paid pursuant to court order 6-4-12.)	
	Aff.Pub.	Petitioner prays for an order as follows:	
	Sp.Ntc.	1. Notice of Hearing of this account, report, and petition be given as required by law;	
	Pers.Serv.	2. Settling and accepting this account and report;	
	Conf. Screen	3. Authorizing payment of \$7,295.00 to Joanne Sanoian for her services to the petitioner and the conservatorship estate during this account period, and authorizing withdrawal of \$4,609.97 from Chase blocked account xxx5483 and \$2,685.03 from Chase account xxx6758 (total \$7,295.00) in certified funds payable to Joanne Sanoian;	
	Letters	4. After payment of the above sums, the Court authorize and direct Katina Sapien Lozano Pauley, Conservator of the Estate, to close Chase Bank blocked account ending in #5483 and deposit the remaining balance into Chase Bank checking account #6758;	
	Duties/Supp	5. The Court authorize and direct Katina Sapien Lozano Pauley to distribute the funds remaining in Joanne Sanoian's Client Trust Account into Chase Bank checking account #6758; and that on filing of proper receipts, Petitioner be discharged as conservator of the person and estate;	
	Objections	6. That surety on Petitioner's bond be discharged upon filing of an ex parte order for final discharge; and	
	Video Receipt	7. For such other orders as the Court deems proper.	
	CI Report		
✓	2620(c)		
	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 3-26-14
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 2 – Lozano

(1) First and Final Account and Report of Administrator and Petition for Its Settlement and (2) Allowance of Statutory Commissions and (3) For Final Distribution

DOD: 04/13/12		DARRYL GRANT , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 04/13/12 – 01/31/14	CONTINUED FROM 03/17/14 Minute Order from 03/17/14 states: Mr. Diaz is appearing as counsel for Jeff McKinley. Mr. Diaz objects to the Petition and requests a continuance to file written objections.
Cont. from 031714		Accounting - \$70,000.00	As of 03/26/14, nothing further has been filed in this matter.
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$67,000.00	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$39,791.26 (all cash)	
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC	Administrator - \$2,800.00 (statutory)	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	Attorney - \$2,800.00 (statutory)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Costs - \$2,266.80 (filing fees, publication, certified copies, bond premium, probate referee)	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	06/15/12	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order	Darryl Grant - \$15,612.23	
<input type="checkbox"/>	Aff. Posting	Raymond Grant - \$15,612.23	
<input type="checkbox"/>	Status Rpt		Reviewed by: JF Reviewed on: 03/26/14 Updates: Recommendation: File 4 – Grant
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Atty Poochigian, Mark S., of Baker Manock & Jensen (for Petitioner Gregory C. Simonian)

(1) First and Final Report of Personal Representative, Petition for Final Distribution and (2)
Allowance of Attorneys' Fees on Waiver of Accounting

DOD: 2/22/2013		GREGORY C. SIMONIAN , nephew and Administrator with Will Annexed, is Petitioner. Accounting is waived. <table> <tr> <td>I & A</td> <td>—</td> <td>\$1,608,506.78</td> </tr> <tr> <td>POH</td> <td>—</td> <td>\$1,453,935.86</td> </tr> <tr> <td colspan="3">(\$124,106.18 is cash)</td> </tr> <tr> <td>Administrator</td> <td>—</td> <td>waives</td> </tr> <tr> <td colspan="3">(statutory)</td> </tr> <tr> <td>Attorney</td> <td>—</td> <td>\$29,085.07</td> </tr> <tr> <td colspan="3">(statutory)</td> </tr> <tr> <td>Costs</td> <td>—</td> <td>\$451.00</td> </tr> <tr> <td colspan="3">(filing fee, certified copies)</td> </tr> <tr> <td>Closing</td> <td>—</td> <td>\$10,000.00</td> </tr> <tr> <td colspan="3">(for administration expenses and liabilities, including accountant's fees for the fiduciary tax returns;)</td> </tr> </table> Distribution pursuant to Decedent's Will and Codicil is to: ELAINE SIMONIAN – [\$84,570.11] cash , real property, furnishings, furniture, and personal belongings, automobile, and shares of stock.	I & A	—	\$1,608,506.78	POH	—	\$1,453,935.86	(\$124,106.18 is cash)			Administrator	—	waives	(statutory)			Attorney	—	\$29,085.07	(statutory)			Costs	—	\$451.00	(filing fee, certified copies)			Closing	—	\$10,000.00	(for administration expenses and liabilities, including accountant's fees for the fiduciary tax returns;)			NEEDS/PROBLEMS/COMMENTS: 1. Based upon the amount of cash on hand of \$124,106.18 stated in the proposed order, the distribution of cash to the beneficiary should be \$84,570.11 , rather than \$89,570.11 as stated in the proposed order. Need clarification and/or revised proposed order. (Note: Proposed distribution at Schedule C indicates the closing reserve will be \$5,000.00 rather than \$10,000.00.)
I & A	—		\$1,608,506.78																																	
POH	—		\$1,453,935.86																																	
(\$124,106.18 is cash)																																				
Administrator	—		waives																																	
(statutory)																																				
Attorney	—		\$29,085.07																																	
(statutory)																																				
Costs	—		\$451.00																																	
(filing fee, certified copies)																																				
Closing	—		\$10,000.00																																	
(for administration expenses and liabilities, including accountant's fees for the fiduciary tax returns;)																																				
Cont. from																																				
<input type="checkbox"/>	Aff.Sub.Wit.																																			
<input checked="" type="checkbox"/>	Verified																																			
<input checked="" type="checkbox"/>	Inventory																																			
<input checked="" type="checkbox"/>	PTC																																			
<input checked="" type="checkbox"/>	Not.Cred.																																			
<input checked="" type="checkbox"/>	Notice of Hrg																																			
<input checked="" type="checkbox"/>	Aff.Mail W/																																			
<input type="checkbox"/>	Aff.Pub.																																			
<input type="checkbox"/>	Sp.Ntc.																																			
<input type="checkbox"/>	Pers.Serv.																																			
<input type="checkbox"/>	Conf. Screen																																			
<input type="checkbox"/>	Letters 051513																																			
<input type="checkbox"/>	Duties/Supp																																			
<input type="checkbox"/>	Objections																																			
<input type="checkbox"/>	Video Receipt																																			
<input type="checkbox"/>	CI Report																																			
<input checked="" type="checkbox"/>	9202																																			
<input checked="" type="checkbox"/>	Order																																			
<input type="checkbox"/>	Aff. Posting																																			
<input type="checkbox"/>	Status Rpt																																			
<input type="checkbox"/>	UCCJEA																																			
<input type="checkbox"/>	Citation																																			
<input checked="" type="checkbox"/>	FTB Notice																																			
		Reviewed by: LEG Reviewed on: 3/26/14 Updates: Recommendation: File 7 – Rudy																																		

(1) Petition for Final Distribution and (2) for Allowance of Statutory Fees to Attorney
on Waiver of Accounting

DOD: 8-5-13			ROBERT ALLEN MAXWELL , Executor with Full IAEA without bond, is Petitioner. Accounting is waived. I&A: \$182,600.00 POH: \$182,600.00 (cabin plus furniture/furnishings, tools/equipment) Executor (Statutory): Waives Attorney (Statutory): \$6,478.00 (to be paid outside of probate) Costs: Not stated (costs to be paid outside of probate includes cost for preparation and filing of tax returns.) Distribution pursuant to Decedent's will and Disclaimer filed 1-6-14: Robert Allen Maxwell: Entire estate (cabin plus furniture/furnishings, tools/equipment)	NEEDS/PROBLEMS/COMMENTS: 1. The Inventory and Appraisal indicates at #5 (Property Tax Certificate) that the requirements of Revenue and Taxation Code §480 are not applicable because the decedent owned no real property at the time of death. However, the cabin (#3 on the I&A valued at \$180,000.00) does have a parcel number. The Court may require clarification as to the Property Tax Certificate. Is the cabin not considered real property?
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC	X		
✓	Not.Cred.			
N/A	Notice of Hrg			
N/A	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCC/JEA			
	Citation			
✓	FTB Notice			

Reviewed by: skc
Reviewed on: 3-26-14
Updates:
Recommendation:
File 8 – Maxwell

Petition by Personal Representative for Leave to Resign

DOD: 2-18-10		DAVID J. EDWARDS , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner was appointed Administrator with Full IAEA with bond of \$99,000.00 on 12-5-13; however, bond has not been filed and Letters have not issued.	<p>1. Need Duties and Liabilities of Personal Representative and Confidential Supplement (DE-147 and DE-147S) from Proposed Successor Administrator Bruce D. Bickel.</p> <p>2. Need order.</p> <p><u>Note:</u> On 12-5-13, the Court set status hearings as follows:</p> <ul style="list-style-type: none"> • Friday, 05/02/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Friday, 02/06/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
<p>Petitioner states he has been unable to obtain the probate bond ordered by the Court on 12-5-13 and it is therefore necessary that he resign as Administrator and that the Court appoint a Successor Administrator. Bruce D. Bickel is agreeable to act. Consent attached.</p> <p>Petitioner states that during the time period from 12-5-13 to the present, Petitioner has undertaken no action on behalf of the estate and has not come into possession of any property.</p> <p>Petitioner states the only property of the estate known to Petitioner is the sum of \$98,957.13, which is not in the possession of Petitioner, but has escheated to the State of California and is currently being held by John Chiang, California State Controller.</p>			<p>Reviewed by: skc</p> <p>Reviewed on: 3-26-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 – Girazian</p>

Petition to Instruct Trustee as to Distribution of Assets

Peter Tym DOD: 2-23-13		CENTRAL CALIFORNIA CONFERENCE OF SEVENTH-DAY ADVENTISTS , Trustee, is Petitioner. Petitioner states the Peter & Doris Tym 2000 Family Charitable Remainder Unitrust was created between Petitioner as trustee and Peter and Doris Tym as settlors or donors. The trust agreement provides as follows: <ul style="list-style-type: none"> • Confirms donors' transfer of certain parcels of real property to the trustee • Defines "unitrust percentage" to be the amount used to determine the "unitrust amount" and states the "unitrust percentage" shall be 6.18% • States the "unitrust recipients" shall be Peter and Doris Tym and their children, Ardyth B. Price, Sharon M. Foley, and Bonnie Lea J. Corson • States that at the end of the period described in Paragraph 6, the then-remaining principal and income of the trust shall be distributed free of trust to Petitioner • States that commencing January 1 of the year after the parcels referred to in above are sold by the trustee, the "unitrust amount" shall be an amount equal to the "unitrust percentage" (6.18%) multiplied by the net fair market value of the trust assets value as of the first day of each calendar year, adjusted as otherwise provided for in the trust agreement (not applicable to this petition) • States the trustee shall pay the "unitrust amount" each taxable year of the trust in monthly installments at the end of each month, and also states that the installments are to be paid to or applied for the benefit of the donors, or the survivor of them, during their lifetimes, and upon both of their deaths, these installments are to be paid in equal shares to or for the benefit of the unitrust recipients (the donors' daughters) living at the time of such distribution. 	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 2-25-14</u>	
Doris Tym DOD: 4-2-09				
Cont. from 022514				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

SEE ADDITIONAL PAGES

Page 2

Petitioner states that by 10-3-2000, the trustee had completed the sales of real property and on 1-31-01 began paying the unitrust amount on a monthly basis to the donors until 3-31-09. Doris Tym died on 4-2-09. Thereafter, commencing 4-30-09, Petitioner paid the monthly installments to Peter Tym until 1-31-13. Peter Tym died on 2-23-13.

Petitioner states that in the meantime, in the first few months of 2010, after Doris' death, Les Palinka, Peter Tym's independent legal counsel (also nephew) contacted Petitioner's legal counsel Grant N. Mitchell by phone and informed him that Mr. Tym wished to have the entire corpus of the trust be distributed free of trust to Petitioner as the charitable beneficiary of the trust immediately upon his death, without any portion of the unitrust amount being paid to or for the benefit of his daughters. Mr. Palinka asked Mr. Mitchell if there was something Mr. Tym could do to carry out his wishes. Mr. Mitchell informed Mr. Palinka that he would review the document.

On or about 4-20-10, Mr. Mitchell contacted Mr. Palinka and informed him that pursuant to his review, it appeared that each donor reserved the right to revoke and terminate the interests of any other unitrust recipient in his or her one-half interest. If either donor exercised this testamentary power of revocation, then at that donor's death, that donor's one half interest in the unitrust amount was to be distributed to the remaining unitrust recipient, if any, whose interests were not revoked, and if none, to Petitioner, free of trust, as the charitable beneficiary. The trust also states that a donor who is a current income recipient retains the right to direct the trustee to distribute an undivided percentage of trust assets on the last day of any taxable year to qualified exempt organizations. Petitioner is and at all times has been a qualified exempt organization as defined in the trust.

Mr. Mitchell expressed his opinion that the term "an undivided percentage" included 100% and stated that he was not advising either Mr. Palinka or Mr. Tym to take either or both of these actions; he was only responding to the inquiry of options under the agreement.

About one year later, Mr. Tym executed a Last Will and Testament which revokes and terminates the interests of any and all other unitrust recipients set forth in the trust agreement, and states that Mr. Tym was specifically, intentionally, and knowingly directing that the trustee immediately distribute Mr. Tym's one half interest in the trust corpus to Petitioner.

Petitioner states the effect of the will was to require Petitioner as trustee to distribute Mr. Tym's one half interest in the trust corpus to Petitioner as the charitable beneficiary and to use the remaining trust corpus (Doris Tym's one half interest) to or for the benefit of Sharon M. Foley and Bonnie Lea J. Corson (Ardyth M. Price having previously died), and upon their deaths, to distribute the remaining trust principal to Petitioner as the charitable beneficiary.

SEE ADDITIONAL PAGES

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On 5-9-11, Mr. Palinka asked Mr. Mitchell to prepare and send Mr. Palinka a form of instruction letter whereby Mr. Tym could direct Petitioner as trustee to distribute 100% of the remaining trust assets to Petitioner as the charitable beneficiary on the last day of any trust taxable year in which Mr. Tym's death occurred. On 6-23-11, Mr. Mitchell sent Mr. Palinka a form of instruction letter and expressly informed him that it was Petitioner's understanding that Mr. Palinka was acting as Mr. Tym's attorney and that Mr. Mitchell was not acting as Mr. Tym's attorney in that matter; that Mr. Mitchell made no representations whatsoever as to what tax or other effect Mr. Tym's execution of the instruction letter may or may not have, etc.

Mr. Palinka did prepare such an instruction letter and reviewed same with Mr. Tym on 8-8-11 regard to the potential consequences of executing it. Mr. Tym expressed his desire to execute the instruction letter and did so. Mr. Palinka advise Mr. Mitchell of these facts and that he was sending the instruction letter to Mr. Mitchell via US Mail, which Mr. Mitchell received 8-10-11.

The effect of the instruction letter was to require Petitioner as trustee on the December 31 following Peter Tym's death to distribute to Petitioner as charitable beneficiary of the trust and free of trust the remaining one half interest in the trust income and principal not covered by Peter Tym's exercise of his testamentary power of revocation in his will.

On 1-1-13, and continuing through the present time, the trust corpus has consisted entirely of cash, and on 1-1-13 the cash totaled \$246,888.55. On or about that date, pursuant to the trust agreement, the trustee multiplied that amount by 6.18% (the unitrust percentage) to arrive at a figure of \$15,257.71 (the unitrust amount), which divided by 12 determines the monthly installment of \$1,271.48 paid to Peter Tym on 1-31-13.

Shortly after Mr. Tym's death on 2-23-13, and pursuant to the instructions in his will, Petitioner subtracted Mr. Tym's one half interest in the unitrust amount leaving a remaining unitrust amount monthly installment balance of \$635.74 to be divided equally between the two surviving daughters for the remaining 11 months.

Although Mr. Tym's will directed Petitioner to distribute to itself Peter Tym's one half interest upon his death, Petitioner has not distributed any portion or income thereon pending instructions from this Court. Also, although Mr. Tym's instruction letter directed Petitioner to distribute to itself, as the charitable beneficiary of the trust and free of trust on 12-31-13 the remaining one half interest in the trust principal and income not affected by Mr. Tym's will, Petitioner has not made any distributions of that principal or income thereon pending instructions from this Court.

SEE ADDITIONAL PAGES

Page 4

Petitioner requests instructions directing Petitioner as trustee on how to distribute the principal and income in the trust. It is Petitioner's belief that the Court should:

- A. Make a finding that in calculating the monthly installment, as of 2-28-13, on the basis of one half of the trust corpus as valued on 1-1-13, and thereafter paying the sum of \$3,496.57 to the two living daughters, that Petitioner acted properly as trustee and fulfilled its obligations to make distributions to the two living daughters; and
- B. Instruct Petitioner that Petitioner as trustee should forthwith distribute free of trust the entire remaining trust estate to itself as the charitable beneficiary.

Petitioner prays for an order instructing the trustee with regard to the proper administration of the trust with respect to the matters alleged herein, for costs herein, and for such other orders as the Court may deem proper.

Memorandum of Points and Authorities also provided.

Lucrezia Policarpo DOD: 7-16-07		FRANK J. POLICARPO and DONNETTA M. POLICARPO , Co-Trustees of the Policarpo Family Trust U/D/T/ dated 6-1-07 (the Family Trust), are Petitioners. Petitioners state the Family Trust is a sub-trust of the Jimmie Policarpo and Lucrezia Policarpo Trust dated 1-23-96 and amended and restated on 6-1-07. Upon the death of Lucrezia Policarpo on 7-16-07, the trust was divided into the Survivor's Trust and the Family Trust. Certain real property on N. Warren Street in Fresno was allocated to the Family Trust by Jimmie Policarpo per quitclaim deed recorded 9-29-09 (attached). On or about 8-24-12, Jimmie Policarpo borrowed \$82,000.00 and in connection with the loan, transferred the residence out of the Family Trust by deed recorded 8-24-12 and executed a deed of trust on that date (attached). After the loan was obtained, Jimmie Policarpo did not transfer title back to the Family Trust. Jimmie Policarpo died on 8-5-13. Petitioners state Jimmie Policarpo transferred the residence out of the Family Trust and into his own name to facilitate obtaining the loan and did not intend to make a distribution of the residence from the Family Trust. Petitioners state that in connection with the loan transaction, Jimmie Policarpo held title to the residence under a constructive trust and that the residence was under Jimmie Policarpo's control as trustee of the Family Trust. Petitioners request that this Court confirm that the residence is part of the Family Trust. Petitioners pray for an order that the real property commonly known as 7247 North Warren Avenue, Fresno, California, 93711 (legal description provided) is an asset of the Policarpo Family Trust U/D/T dated 6-1-07.	NEEDS/PROBLEMS/COMMENTS:
Jimmie Policarpo DOD: 8-5-13			
	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
	Inventory		
	PTC		
	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc Reviewed on: 3-27-14 Updates: Recommendation: File 11 – Policarpo

Petition to Determine Succession to Real Property and Personal Property (Prob. C.
13151)

DOD: 02/28/12		CYNTHIA REY MCKENZIE , daughter, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD.	1. The Petition (and will) indicate that the Decedent had a predeceased spouse, therefore the spouse's name and date of death should be listed on attachment 14 (see Local Rule 7.1.1D).
		No other proceedings.	
Cont. from		I & A - \$43,000.00	2. The Petition is not marked at item 9(a)(7) or (8) regarding issue of a predeceased child.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		3. Need Order.
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Will dated 03/05/11 devises real property located at 124 Harrison Street in Coalinga to Petitioner.	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/o	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Petitioner requests Court determination that decedent's 100% interest in real property located at 124 Harrison Street, Coalinga, CA pass to her pursuant to decedent's will.	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	x	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: JF
Reviewed on: 03/27/14
Updates:
Recommendation:
File 12 – Rey

Atty Richardson, Robert (pro per – maternal grandfather/Petitioner)
 Atty Pierce (Richardson), Tina (pro per – maternal step-grandmother/Guardian)
Petition for Visitation

Aliah, 5	ROBERT RICHARDSON , maternal grandfather, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 2. Need proof or service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation</i> <u>or</u> Declaration of Due Diligence for: a. Tina Pierce (Richardson)(Guardian) b. Aliah's father c. David Massey, Jr. (Jasmine's father) d. Paternal grandparents (all)
Jasmine, 4	TINA PIERCE (formerly Tina Richardson) , maternal step-grandmother, was appointed as guardian of Aliah on 06/18/09 and as guardian of Jasmine on 06/02/10.		
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.	Father (Aliah): UNKNOWN		
<input checked="" type="checkbox"/> Verified	Father (Jasmine): DAVID MASSEY, JR.		
<input type="checkbox"/> Inventory	Paternal grandparents: UNKNOWN		
<input type="checkbox"/> PTC	Maternal grandmother: EVELYN WADLEY – deceased		
<input type="checkbox"/> Not.Cred.	Petitioner states that a visitation plan was established during mediation and implemented without a problem; however, the guardian has failed to follow the agreed upon plan. Petitioner would like to resume visiting with his granddaughters as agreed upon during mediation.		
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
Reviewed by: JF			
Reviewed on: 03/27/14			
Updates:			
Recommendation:			
File 13 – Richardson			

St. Louis, Allison M. (Pro Per Petitioner)

Winter, Gary L. (for David and Arlene Liles, Guardians of the Person and Guardians Ad Litem of Beneficiary Raven Nicole Bailey)

First Accounting and Report of Allison M. St. Louis, Representative of Prior Trustee, David J. St. Louis, and Petition for Payment of Fees and Costs and [Proposed]
Order

		ALLISON ST. LOUIS , representative of former trustee DAVID J. ST. LOUIS , is Petitioner. Account period: 9-5-07 through 12-31-12 Accounting: \$872,733.60 Beginning POH: \$683,204.07 Ending POH: \$486,664.47 Petitioner requests that Mr. Leas, the current trustee, be directed to pay Mr. St. Louis' fees earned prior to death. Mr. St. Louis was last compensated in the amount of \$1,800.00 on 7-19-12 for the period covering 1-1-12 through 6-30-12. Therefore, he is owed compensation for the period 7-1-12 through 10-6-12 in an amount to be determined by the Court. Additionally, Mr. St. Louis' costs include \$124.01 for photocopies and postage. See Exhibit 2. Petitioner also requests that Mr. Leas be directed to repay Petitioner for her time in the amount of \$631.00 (for 33.05 hours @ \$20/hr) and costs in the amount of \$19.05. Petitioner states she acted in the best interest of the trust while there was no trustee to keep the trust active by keeping the Liles' informed of the condition of the estate, creditors apprised of the situation regarding payment of bills for Raven Bailey, etc. Petitioner states she met with Attorney Gary Winter for legal advice and met with the Arlene Liles and Karl Preheim of Wells Fargo regarding the trust investments. See Exhibit 3. Petitioner requests that this accounting be accepted by the Court; that the trustee be directed to pay appropriate fees and costs to the Estate of David J. St. Louis for his services from 7-1-12 through 10-6-12; and that the trustee be directed to pay Allison M. St. Louis her fees and costs as requested.	NEEDS/PROBLEMS/COMMENTS: Note re History: David and Arlene Liles, Guardians of the Person and Guardians Ad Litem for Raven Nicole Bailey, minor beneficiary, filed a petition to appoint a successor trustee upon the vacancy due to the death of David St. Louis on 10-7-12. On 5-21-12, the Court granted the petition and appointed H.F. Rick Leas, professional fiduciary, with bond of \$500,000.00, and ordered this accounting of the prior trustee's administration to be filed by Ms. St. Louis. Note: Attached to this petition is the Independent Accountant's Compilation Report prepared by Dritsas Groom McCormick LLP. 1. Need filing fee of \$435.00. This petition was filed with a fee waiver based on Ms. St. Louis' personal household income; however, this petition indicates trust assets of \$486,664.47 at the end of the account period (12-31-12) and the Liles' original petition indicated the current value of the trust assets was \$532,114.73. 2. Need Notice of Hearing and proof of service of Notice of Hearing at least 30 days prior to the hearing per Probate Code §17203 on all interested persons. 3. Petitioner does not specify the amount of compensation requested for the three month period for which the former trustee was not paid, and Petitioner also does not indicate who payment should be made to. It does not appear that a probate has been established or personal representative appointed for Mr. St. Louis. 4. Need order.
		Reviewed by: skc Reviewed on: 3-27-14 Updates: Recommendation: File 14 – Bailey	

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Mellissee', 14		GENERAL HEARING 05/21/14		NEEDS/PROBLEMS/COMMENTS:	
Mikayla, 12		MARY POOLE , paternal grandmother, and DIANNA PERKINS , paternal aunt, are Petitioners.		1. Need Notice of Hearing.	
		Father: RALPH POOLE – Consent & Waiver of Notice filed 03/19/14		2. Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Temporary Petition <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:	
Cont. from		Mother: MICHELLE POOLE CASTILLO		a. Michelle Castillo (mother)	
	Aff.Sub.Wit.		Paternal grandfather: DECEASED	b. Mellissee' (minor)	
✓	Verified		Maternal grandfather: DECEASED	c. Mikayla (minor)	
	Inventory		Maternal grandmother: VERONICA DeGUNTHER	3. Dianna Perkins' Confidential Guardian Screening Form is blank at the following items:	
	PTC		Petitioners allege that the children live with their mother who is very volatile and has uncontrollable outbursts. The mother has made false statements to Mikayla to try to turn her against her father. Mikayla is in need of counseling from the problems created by her mother. Mellissee' has special needs that her mother is not meeting, including failing to seek adequate medical attention for her.	#3 – I have/have not been charged with, arrested for, or convicted of a crime deemed to be a felony or a misdemeanor.	
	Not.Cred.			#5 – I am/am not receiving services from a psychiatrist, psychologist, or therapist for a mental health-related issue.	
	Notice of Hrg	x		#10 – Have you, or has any other person living in your home, been charged with, arrested for, or convicted of a crime involving illegal substances or alcohol?	
	Aff.Mail			#12 – Do you suffer from any physical disability that would impair your ability to perform the duties of a guardian?	
	Aff.Pub.			#19 – I have/have not filed for bankruptcy within the last 10 years.	
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 03/27/14	
				Updates:	
				Recommendation:	
				File 19 – Poole	

1A Louis Brosi, Sr. (Trust)

Case No. 07CEPR01213

Atty David M. Gilmore and Ryan M. Janisse (for Cindy Snow Henry – Beneficiary – Petitioner)

Atty Armo, Lance (for Robert Snow)

Atty Paul Franco (for Louis Brosi, III)

Atty Wilson, Joshua G. (of Bakersfield, for Louis Brosi, Jr.)

Notice of Motion and Motion to Compel Performance Under Settlement Agreement

		CINDY SNOW HENRY , Trust beneficiary, filed Notice of Motion and Motion to Compel Performance Under Settlement Agreement on 3-15-11.	NEEDS/PROBLEMS/COMMENTS: Previously, there were four (4) separate matters on calendar: Page A: Ms. Henry's Motion filed 3-15-11 Page B: Court Trial (Previously: Status Conference Re: Lot Split & Related Matters) Page C: Ms. Henry's Petition filed 11-5-12 Page D: Settlement Conference Re: Issue of Removing Louis Brosi, Jr. (per Min Order 1-2-13 of Cindy Henry's Motion filed 3-15-11, Page 2A) Note: CINDY SNOW HENRY filed a new Petition to Remove Trustee; Appoint Public Administrator as Trustee; Require Trustee Correct Title; and Compel Trustee to Account on 11-5-12 (Page 1C). Update: On 3-3-14, the Court made orders in connection with Page C (Ms. Henry's Petition filed 11-5-12). Therefore, that matter was not continued. However, no orders have been submitted for signature. 1. The Court may require updated information regarding whether Petitioner intends to pursue a ruling on <u>this petition</u> with reference to the new petition filed 11-5-12 and orders made on 3-3-14.
Cont. from 121012, 010213, 020413, 030413, 031213, 041813, 051713, 062813, 081213, 091613, 102213, 112113, 120213, 121813, 012914, 030314			
<input type="checkbox"/>	Aff.Sub.Wit.	<p>The petition seeks to have the court order LOUIS BROSI, III carry out the acts necessary to partition the property into three parcels anticipated and directed by the settlement reached 3-5-09.</p> <p>LOUIS BROSI, JR. filed Opposition on 4-28-11 stating that new issues have arisen since the settlement.</p> <p>Minute Order 1-2-13: Mr. Wilson is appearing as counsel for Louis Brosi, Jr. Counsel requests a continuance. The Court sets a Settlement Conference for 2/4/13. Parties are directed to submit their settlement conference briefs along with courtesy copies for the Court by 1/30/13. Mr. Wilson is directed to submit any further objections by 1/30/13. The Court indicates to all counsel that it will entertain any order presented upon consent of the parties. Mr. Franco is directed to submit an order prior to 2/4/13 for the purpose of expediting the County process. Continued to 2-4-13 at 10:30am in Dept 303. Set on 2-4-13 at 10:30am in Dept 303 for Settlement Conference Re: Issue of Removing Louis Brosi, Jr.</p>	
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
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<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc Reviewed on: 3-26-14 Updates: Recommendation: File 1A - Brosi

1B	Louis Brosi, Sr. (Trust)	Case No. 07CEPR01213
Atty	David M. Gilmore and Ryan M. Janisse (for Cindy Snow Henry – Beneficiary – Petitioner)	
Atty	Armo, Lance (for Robert Snow)	
Atty	Paul Franco (for Louis Brosi, III)	
Atty	Wilson, Joshua G. (of Bakersfield, for Louis Brosi, Jr.)	

Court Trial (Previously: Status Conference Re: Lot Split & Related Matters)

<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Set on 121012, 010213, 020413, 030413, 031213, 041813, 051713, 062813, 081213, 091613, 102213, 112113, 120213, 121813, 012914, 030314 </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 10%;">Aff.Sub.Wit.</td><td style="width: 10%;"></td></tr> <tr><td>Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td></td></tr> <tr><td>Aff.Mail</td><td></td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>	Aff.Sub.Wit.		Verified		Inventory		PTC		Not.Cred.		Notice of Hrg		Aff.Mail		Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order		Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note: This matter is set for Court Trial pursuant to Minute Order 12-10-12.</u></p> <p>(Examiner kept this matter's place as "B" page to keep matters in order.)</p> <p><u>Minute Order 12-10-12</u> <u>(Continued Status Conference Re: Lot Split & Related Matters):</u> Mr. Franco informs the Court that the issues have been resolved and the map has been filed with the County. Matter set for Court Trial on 1/2/13. The Court directs all counsel to file their briefs by 12/20/12.</p> <p><u>Minute Order 12-18-13:</u> The Court will sign the stipulation and order regarding the lot split which is to be filed and not released until the parties have received payment, the promissory note, and the settlement agreement. Counsel is directed to prepare the necessary documents and provide the appropriate notice.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 20px;"> <tr><td>Reviewed by: skc</td></tr> <tr><td>Reviewed on: 3-26-14</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 1B - Brosi</td></tr> </table>	Reviewed by: skc	Reviewed on: 3-26-14	Updates:	Recommendation:	File 1B - Brosi
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Atty Paul Franco (for Louis Brosi, III)

Atty Wilson, Joshua G. (of Bakersfield, for Louis Brosi, Jr.)

Status Hearing

		On 3-3-14, the Court granted Ms. Henry's petition filed 11-5-12.	NEEDS/PROBLEMS/COMMENTS:
		Minute Order states: The Court removes Louis Brosi, Jr., as the trustee and appoints Doris Brosi as successor trustee. Counsel is directed to submit a revised order. See Minute Order for Status Hearing (Page D) for further details.	1. Need order approving petition from Ms. Henry. 2. Need status report regarding orders made on 3-3-14. 3. The Court has appointed Doris Brosi as trustee. Doris Brosi has not made an appearance in this matter. Therefore, it appears that a filing/appearance fee of \$435.00 is due from Doris Brosi.
Cont. from 030314			
Aff.Sub.Wit.		Minute Order (Status Hearing, Page D) states: The Court removes Louis Brosi, Jr. as the trustee and appoints Doris Brosi as successor trustee. An offer is made in open court. Mr. Gilmore's client is directed to respond to the offer by no later than 5:00 p.m. on 3/5/14. Parties agree that Mr. Armo's client will be paid in full \$100,000.00 by the close of business tomorrow with a joint check made out to both Mr. Armo and Robert Snow. The litigation guarantee and appraisal as to 6706 N. Chestnut shall be due by 3/12/14. Additionally, the \$100,000.00 payment to Cindy Snow Henry as well as the first monthly installment shall be due by 4/1/14. Continued to 4/1/14 @ 10:00 a.m. Dept. 303 As of 3-26-14, an order has not been submitted for signature.	Note to Judge: The Court may wish to note a formal disposition for the "A" page of this calendar for the record, which is Ms. Henry's first motion filed 3-15-11. (Ms. Henry filed a different motion, which on 11-5-12, which was recently granted on 3-3-14.)
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